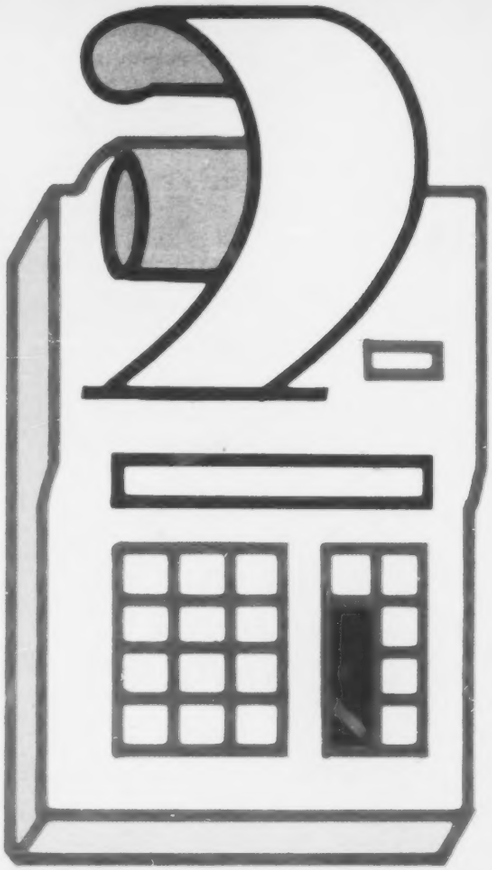
Research Business Report



Revenues near $2 billion, but stormy times ahead

Researchers grapple with their changing role

By Scott Hume

Mix an economic slowdown into a churning cauldron of change and what comes out is the research industry in the 1990s.

The current economy has exacerbated and accelerated changes in marketing and media research more than it has created new troubles, executives at many top companies say.

Among the 71 companies responding to *Advertising Age's* research industry survey, total 1990 gross U.S. research revenues increased 3.2% to $1.96 billion. In comparison, the companies responding to last year's survey saw U.S. research revenues rise only 5.6% from 1988 to 1989.

But the stronger 1990 results don't ease research company executives' concerns about fundamental changes in the competitive environment and their role in the marketing process.

The wave of mergers in the 1980s that resulted in the consolidation of marketing departments at top package-goods companies has had an immediate impact on the competitive environment.

"When a Philip Morris absorbs a General Foods and then a Kraft, or when an R.J. Reynolds acquires a Nabisco, there's only a certain number of service companies and a certain amount of service those [conglomerates] are going to use," says David Learner, president of MRCA Information Services.

"One of the efficiencies of combining companies is the elimination of duplicate services, and the most damage that has been done to marketing research has been done [from mergers]," he says.

That, more than the economy, has spurred consolidations and alliances among research companies as they battle for business among a smaller client universe.

It also intensified price competition among researchers, with earnings for some top companies sliding even as revenues grew.

"Research has been moving into a third phase that will be challenging, certainly, but also provide opportunities," says John Costello, president of Nielsen Marketing Research USA.

> "The most damage that has been done has been done from mergers."

"The first phase was collecting information. The second was turning that information into insights. This third phase will be converting those insights into results."

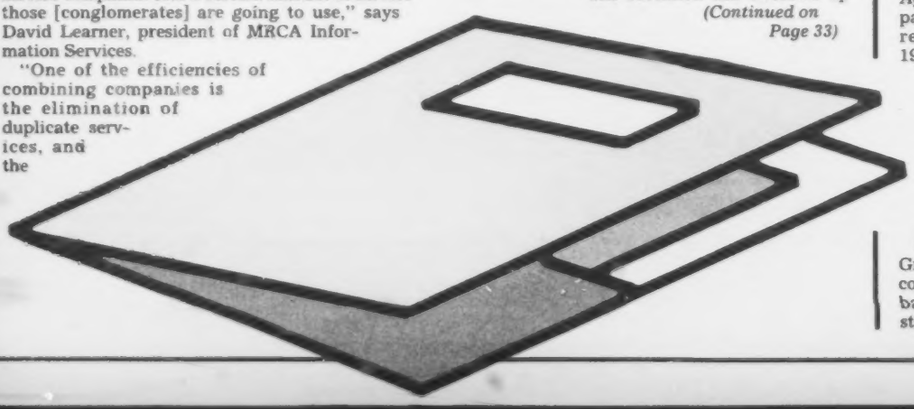
Because of the recession, that third phase has been hastened along, Mr. Costello says. It has focused client attention on productivity and cost of sales more than pure growth.

The down economy also has meant cutbacks in client companies' marketing and research budgets and staffs, and slowed new-product development. Risk taking is out; short-term thinking is in.

That, in turn, has hurt advertising agencies and media companies. And they've tipped over the next domino: companies seeking to sell research to those same operations.

"The recession has tweaked up

(Continued on Page 33)



IRI bounces back via scanner data

By Kenneth Wylie

What's been bad for the research industry has been good for Information Resources Inc., says Chairman-CEO Gian Fulgoni.

He says the industrywide shift from qualitative to quantitative, scanner-based data analysis has helped IRI post the top growth among the 10 largest research companies in *Advertising Age's* 1990 revenue ranking.

"IRI is built on this scanner technology. We're on the right side of this equation with only one competitor in scanner-based information technology, Nielsen," Mr. Fulgoni says.

IRI's 1990 U.S. research revenues climbed 19.8% to $136.3 million, making it No. 4 in *Ad Age's* ranking. The top 10 companies' combined U.S. research revenues rose only 7.6% in 1990. IRI reports first quarter 1991 revenues jumped 25.4% from first quarter 1990 to $48 million.

Founded in 1979 and taken public in 1983, IRI weathered several years of financial stress, but now is operating its two divisions in the black.

Its Information Services Group supplies package-goods companies with marketing data bases that range from broad strategies to shelf position and includes the fast-growing InfoScan supermarket purchase information system. Group revenues rose 16% to $115.3 million in 1990.

Its Software Products Group, which produces business and governmental decision-making models and systems, saw revenues hit $51.4 million, up a substantial 39% above 1989 revenues.

"As information becomes more and more in demand, organizations must have the software that makes it accessible," says Mr. Fulgoni. "What's happening is software is becoming the strategic competitive element."

IRI is hoping to sell its software to an ever-broader customer base.

"Health and beauty aids are an important new area for us," says Senior VP Robert Bregenzer. "We've been in supermarkets. In January 1991 we went into drugstores [using the newly acquired SAMI system]. Starting in July 1991 we'll be in mass merchandisers. We're going head-to-head with Nielsen."

In a mix of sales and licensing agreements at the end of 1990, IRI acquired from Arbitron Co. contracts and usage rights to its SAMI warehouse-withdrawal system, drugstore-withdrawal information, plus TV and radio ratings.

Almost matching IRI's

(Continued on Page 33)

Top research companies by U.S. research revenues

Rank 1990	Rank 1989	Company, headquarters	Gross U.S. research revenues 1990	1989	% chg	Employees Full-time	Part-time	U.S. offices	Top executive	Telephone	Verified
1	1	A.C. Nielsen Co., Northbrook, Ill.*	$468.6	$426.0	10.0%	NA	NA	40	Jack Holt, chmn-ceo	(708) 498-6300	
2	2	Arbitron Co., New York	230.6	253.5	(9.0)	1,918	1,866	8	A.J. Aurichio, president	(212) 887-1300	
3	3	IMS International, Zug, Switzerland*	199.1	181.0	10.0	NA	NA	4	Serge Okun, president-ceo	41-42-211666	
4	4	Information Resources Inc., Chicago	136.3	113.8	19.8	1,858	1,281	7	Gian M. Fulgoni, chmn-ceo	(312) 726-1221	
5	5	Westat, Rockville, Md.	74.8	65.9	13.4	660	NA	5	Joe Hunt, president	(301) 251-1500	
6	6	M/A/R/C, Las Colinas, Texas	56.9	47.9	18.8	500	1,200	9	Cecil B. Phillips, chmn-ceo	(214) 506-3400	
7	7	Maritz Marketing Research, Fenton, Mo.	53.2	46.1	15.4	504	2,000	14	William H. Lewellen, president	(314) 827-4000	
8	8	MRB Group, Ealing, England	45.8	44.6	2.6	366	NA	3	Timothy Bowles, ceo	44-81-579-5550	
9	9	NFO Research, Greenwich, Conn.	45.5	42.0	8.3	400	325	9	William E. Lipner, president-ceo	(203) 629-8888	
10	11	Abt Associates, Cambridge, Mass.	43.4	37.9	14.5	336	778	4	Walter R. Stellwagen, president-ceo	(617) 492-7100	✓
11	12	Gallup Organization, Princeton, N.J.	40.5	37.0	9.5	550	800	7	Jim Clifton, ceo	(609) 924-9600	
12	10	Market Facts, Chicago	40.2	39.0	3.1	515	NA	5	Verne B. Churchill, chmn-ceo	(312) 280-9100	
13	13	NPD Group, Port Washington, N.Y.	31.0	30.0	3.3	275	275	6	Tod Johnson, president	(516) 625-0900	
14	15	Walker Research, Indianapolis	28.8	26.5	8.9	339	646	6	Frank D. Walker, chmn-ceo	(317) 843-3939	
15	14	Burke Marketing Research, Cincinnati	25.2	27.1	(7.0)	308	270	10	Ronald L. Tatham, president-ceo	(513) 852-8585	
16	17	Intersearch, Horsham, Pa.	25.1	21.9	14.6	200	725	2	Alan Widra, president	(215) 657-6400	
17	16	Starch INRA Hooper, Mamaroneck, N.Y.	22.7	22.4	1.3	201	20	2	William J. Wilson, president-ceo	(914) 698-0800	
18	18	Chilton Research, Radnor, Pa.	22.6	21.8	3.6	209	500	2	Marjorie Michitti, vp-general manager	(215) 964-4602	
19	19	Research International, London	19.9	19.8	0.5	180	NA	2	Philip Barnard, chmn-ceo	44-71-235-1588	
20	21	National Research Group, Los Angeles	18.0	14.0	28.6	50	390	1	Joseph Farrell, chmn-ceo	(213) 856-4400	
21	26	Millward Brown, Naperville, Ill.	17.6	11.7	50.1	170	400	3	Robert D. Meyers, president-ceo	(708) 505-0066	✓
22	20	Mediamark Research, New York	16.3	15.2	6.9	55	NA	4	Alain J. Tessier, ceo	(212) 599-0444	
23	25	Creative & Response Research Services, Chicago	14.5	12.2	18.5	115	350	1	Saul Ben-Zeev, chmn-ceo	(312) 828-9200	
24	24	Custom Research, Minneapolis	13.3	12.9	3.5	72	140	4	Judith Corson, Jeffrey Pope, partners	(612) 542-0800	
25	22	Harte-Hanks Marketing Services, River Edge, N.J.	13.3	13.5	(1.5)	160	130	2	Tom Swithenbank, president	(201) 342-6400	
26	23	National Analysts, Philadelphia	13.2	13.3	(0.8)	130	12	1	Marshall G. Greenberg, president	(215) 496-6800	
27	27	Decision Research, Lexington, Mass.	12.0	11.5	4.3	68	14	3	Rob Duboff, sr. vp-director	(617) 861-7350	
28	28	Data Development, New York	12.0	10.6	13.1	100	300	1	Joseph Goldstein, president	(212) 633-1100	✓
29	31	Wirthlin Group, McLean, Va.	11.7	9.5	23.5	67	183	6	Richard B. Wirthlin, chmn-ceo	(703) 556-0001	
30	32	Total Research, Princeton, N.J.	10.5	8.3	25.8	130	250	1	Lorin Zissman, president-ceo	(609) 921-8100	✓
31	29	Lieberman Research West, Los Angeles	10.2	9.8	3.8	42	280	1	Arnold Fishman, chmn	(213) 553-0550	✓
32	33	Conway/Milliken & Associates, Chicago	9.2	8.1	14.0	68	110	1	Foy N. Conway, ceo	(312) 787-4060	✓
33	34	Louis Harris & Associates, New York	8.7	7.8	11.5	85	100	1	Louis Harris, chmn-ceo	(212) 698-9600	
34	30	J.D. Power & Associates, Agoura Hills, Calif.	8.5	9.6	(11.4)	101	57	1	J.D. Power III, president	(818) 889-6330	
35	43	Response Analysis, Princeton, N.J.	8.5	6.0	40.2	77	99	1	James H. Fouss, president	(609) 921-3333	
36	38	ICR Survey Research Group, Media, Pa.	8.4	6.6	27.2	70	250	1	Fred B. Soulas, president	(215) 565-9280	✓
37	36	Newman-Stein, New York	7.9	6.8	16.2	50	0	2	Lawrence Newman, president	(212) 777-2700	✓
38	35	McCollum Spielman Worldwide, Great Neck, N.Y.	7.5	7.3	2.7	54	0	1	Peter R. Klein, president-coo	(516) 482-0310	
39	42	Directions for Decisions, New York	7.0	6.2	12.9	40	0	1	Joseph F. Baldi Jr., chmn	(212) 683-9595	✓
40	44	Shifrin Research, New York	6.9	5.7	20.2	25	4	1	Leslie Shifrin, president	(212) 473-4050	✓
41	41	Field Research, San Francisco	6.7	6.3	6.3	75	125	2	Aaron Levy, president	(415) 392-5763	
42	37	Marketing Research Services, Cincinnati	6.6	6.7	(1.5)	82	140	2	Randall M. Thaman, president	(513) 579-1555	✓
43	39	Vanderveer Group, Fort Washington, Pa.	6.6	6.6	(0.4)	110	13	1	Marc Julius, president, mkt rsch/consulting	(215) 646-7200	✓
44	51	FRC Research, New York	6.5	4.8	37.1	34	60	1	Arnold Feldman, president	(212) 696-0870	✓
45	40	Kapuler Marketing Research, Arlington Heights, Ill.	6.2	6.5	(4.6)	67	235	1	Stanley J. Kapuler, president	(708) 870-6700	✓
46	50	Strategy Research, Miami	6.1	4.9	24.0	52	402	2	Richard W. Tobin, president	(305) 649-5400	
47	49	Meyers Research Center, New York	5.9	4.9	18.4	35	6	1	Gerald C. Meyers, president	(212) 391-0166	✓
48	45	Marketing Analysts, Rockville Centre, N.Y.	5.8	5.4	7.3	26	2	1	Robert Pascale, president	(516) 766-4224	✓
49	46	Marketeam/Doane Marketing Research, St. Louis	5.8	5.2	11.7	70	125	2	Carl E. Block, president	(314) 878-7867	✓
50	47	AHF Marketing Research, New York	5.8	5.1	13.6	56	235	1	Beryl L. Levitt, president	(212) 244-5555	✓
51	58	Ross-Cooper Associates, Teaneck, N.J.	5.1	2.5	108.4	30	4	1	David Ross, president	(201) 836-0040	✓
52	48	Oxtoby-Smith, New York	4.8	5.0	(4.0)	40	15	1	Joseph G. Smith, chmn	(212) 614-0040	✓
53	53	Savitz Research Center, Dallas	4.0	3.3	22.4	30	220	3	Jeffry N. Savitz, president	(214) 386-4050	✓
54	54	Schulman, Ronca, & Bucuvalas, New York	3.9	3.2	22.0	48	180	2	Mark A. Schulman, president	(212) 481-6200	✓
55	52	Bruno & Ridgway Research Associates, Princeton, N.J.	3.5	3.8	(8.4)	36	4	1	Spencer Bruno, chmn	(609) 452-8282	✓
56	55	Rothstein-Tauber, Stamford, Conn.	3.4	2.8	20.4	19	3	1	Melvin Rothstein, chmn	(203) 324-2420	✓
57	56	Market Development, San Diego	2.9	2.5	16.0	28	5	1	Loretta A. Adams, president	(619) 232-5628	✓
58	57	Shugoll Research, Bethesda, Md.	2.8	2.5	12.0	16	40	3	Joan Shugoll, president	(301) 656-0310	✓
59	60	deKadt Marketing & Research, Greenwich, Conn.	2.3	2.2	2.1	18	3	1	Pieter P. de Kadt, president	(203) 661-1161	✓
60	59	JRP Marketing Research Services, Media, Pa.	2.1	2.3	(6.7)	25	50	1	Paul Frattaroli, president	(215) 565-8840	✓
61	61	Booth Research Services, Atlanta	2.0	1.9	6.4	14	100	1	Peter E. Booth, president	(404) 992-2200	✓
62	69	Myers Marketing & Research, Parsippany, N.J.	1.9	0.4	423.4	8	1	1	Jack Myers, president	(201) 808-7333	✓
63	63	Norman Hecht Research, Syosset, N.Y.	1.9	1.1	69.6	13	2	1	Norman S. Hecht, president	(516) 496-8858	
64	62	Research & Forecasts, New York	1.4	1.3	8.3	4	6	1	Nicholas J. Tortorello, chmn	(212) 593-6424	✓
65	68	Target Research Group, Pearl River, N.Y.	1.1	0.5	128.0	3	1	1	Ronald Silver, president	(914) 620-0077	✓
66	65	Hughes Research, Rockville, Md.	1.1	0.8	34.7	7	3	1	Thomas B. Hughes, president-ceo	(301) 294-7500	
67	66	Hispanic Marketing Research, San Antonio, Texas	1.0	0.8	32.0	12	45	3	Naghi Namaldoroosh, president	(512) 736-2000	
68	64	Davidson-Peterson Associates, York, Maine	0.9	0.8	7.3	12	10	1	Thomas Lea Davidson, ceo	(207) 363-7347	
69	67	Miller Research Group, Little Rock, Ark.	0.7	0.6	25.5	7	6	1	David F. Miller, president	(501) 221-3303	✓
70	71	Northstar Research Associates, New York	0.7	0.3	155.9	2	5	1	Martin D. Yazmir, president	(212) 594-1117	✓
71	70	Mal Ochs Associates, White Plains, N.Y.	0.3	0.3	(8.3)	2	3	1	Mal Ochs, president	(914)-761-5805	

Notes: Dollars are in millions. * Indicates figures are AA estimates. Source: AA survey.

Compiled by: Kenneth Wylie and Kathy Wolyki. AA chart: Kathy Wolyki

Grappling with changing role

(Continued from Page 31)

the competitive environment," says Verne Churchill, chairman-ceo of Market Facts. "There are so many more people claiming to do market research because a lot of them are people who had responsible positions [at client companies] who have been let go.

"A lot of them have very low overhead or are willing to compromise their margins. The big companies have had to respond. . . . Last year our revenues were up slightly, but our earnings were off."

With fewer buyers and lower budgets, the business of selling research has become more difficult.

"It's tougher to sell, but the reality that shines through is companies are choosing one research company or the other instead of buying it all as they did in the old days," says Bernadette Cognac, VP-syndicated studies for Simmons Market Research Bureau.

"We're finding that client service and the quality of the data have taken on new meaning and importance for our clients, and that's not a bad thing," she says. "They're still buying, but they're double-checking what they're getting. . . . There may be fewer early renewals on syndicated research. But they're buying."

Simmons recently offered a new syndicated study on the children's market that Ms. Cognac says has been well-received. "We knew the market for this study was there. But we also know we're at the mercy of the economy."

New research development may suffer if the recession continues or deepens, says Alice Sylvester, senior VP at J. Walter Thompson USA, Chicago.

"It's no secret that agencies have been downsizing, and there are fewer developmental [research] dollars available," she says. "The big exploration heyday of the '80s is over. The exploration process for agencies has been derailed to a great extent.

"Information Resources is marketing a [$50,000] study on 'How Advertising Works' that I think may be the last big project of that kind offered for a while."

IRI's James Andress, president-ceo, disagrees.

"Agencies don't account for a large percentage of our business," he says, so their downsizing doesn't severely hurt.

Clients such as Procter & Gamble Co. and Unilever are as committed to research as ever, he contends, and the company doesn't intend to scale back plans to expand or develop its research projects.

For media researchers, however, the marketplace may have changed more dramatically and more permanently.

"Even before this recession the industry we serve was undergoing changes, and that had a greater impact on us than the recession," says Ken Wollenberg, exec VP-sales and marketing at Arbitron Co. "We're reacting to the possibility that the broadcast business may never again be the same as it was a few years ago.

"Our customers have more of an eye on the bottom line. The broadcast companies are being run by financial people, and many of the companies are carrying a heavy debt load.

"So they ask, 'What's the payback of research?' This can be a tough question to answer any time, and then in economic hard times clients further question spending on research," he says.

While many researchers may agree with Mr. Wollenberg when he says, "It won't ever be like the '80s again," they won't say the outlook is hopeless.

"I don't see a diminution of our business as a result [of the recession], but I do see our requirements change as our clients change," MRCA's Mr. Learner says. "Clients expect more from us than they may have before when their own staffs were larger. And that's a big plus for us." □

Kenneth Wylie, an Evanston, Ill.-based free-lance writer, contributed to this story.

IRI

(Continued from Page 31)

growth rate is M/A/R/C, which ranked No. 6 with 1990 U.S. research revenues of $56.9 million, up 18.8% from 1989. The company attributes the surge to its new Macro Products simulated test-marketing product, new clients and existing clients' data-base development activities.

Among the 71 research companies responding to *Ad Age's* survey, Myers Marketing & Research, Parsippany, N.J., posted the greatest growth. Its 1990 U.S. revenues shot up 423% to more than $1.9 million as a result of the successful launches of two new services, Worldwide Marketing Leadership Panel and Market Media Influence, says President Jack Myers. □

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Gentle rain turns to torrent

Marketers claim now there's still too much data

By Joseph M. Winski

Ah, for the good old days.

The Nielsen binders would come in. Research would write up reports and send them to marketing. Two months later, the cycle would begin again.

In market research, those days are over for good. Technology can be thanked—or blamed: Scanners and computers have changed the data flow from a gentle rain every other month to a vast river of monthly and even weekly data, often down to store level.

Market research executives at consumer products companies say they're drowning in it all.

"There are just too many numbers and too many things that you can potentially do with them," says Mario Abate, market research director for Warner-Lambert Co.'s American Chicle Group.

The sheer volume of data "has been a nightmare for a lot of client market research directors," says Robert Bailey, director of marketing services at BBDO, Chicago, which does research for clients such as Wm. Wrigley Jr. Co.

"With regard to Wrigley," Mr. Bailey says, "when scanning came along, the amount of data that we were trying to work with . . . multiplied by a factor of five."

The hottest permutation of scanner data, so-called single-source data on the buying behavior of individual households, has added substantially to the overload.

In a late 1989 *Journal of Advertising Research* survey, 71% of company market-research directors questioned agreed that "single-source research has caused an information explosion which is hard to control."

One problem with all the data is that it costs more, simply because there is so much more to buy. The more perplexing issues, though, concern how to handle and interpret the numbers.

Corporate downsizing in the late 1980s has meant companies often have smaller market-research departments. At the same time more people are clamoring for usable data from the research department.

> "The complexity is getting greater and greater."

Today, salesmen have come to appreciate the value of a pitch buttressed by scanner research.

"We really are starting to put together some very specific account presentations based on hard data that the salesman can use to go in and make pitches with," Mr. Abate says.

Thus the quandary: Fewer research people are handling more numbers than ever and are being pressed for answers from more users than ever.

That's leading to a fundamental shift in how research data are handled at some companies.

For example, Colgate-Palmolive Co. has switched to "distributed data processing," a move to decentralize data management and put research in the hands of more staff members, says Jim Figura, VP-consumer research and insights.

Instead of doing the interpreting, research people increasingly are being called upon to show marketing staffers and salespeople how to do it themselves.

That, in turn, means a new type of person in the research department: Someone who understands how to use computers to gather and analyze data but also knows how to help others learn to do so.

Kraft USA has embraced this approach by installing 100 computer workstations in its marketing, sales, promotion and marketing information departments and training 300 people in those departments to use them, says Larry Stanek, VP-marketing information director at parent Kraft General Foods.

The cost, volume and complexity of the data generated by new technologies also are reshaping the relationship between companies and their research suppliers.

Increasingly, companies are relying on just one supplier for numbers they previously may have bought from several vendors. BBDO's Mr. Bailey predicts that by the mid-1990s, "almost all" companies will use just one primary vendor for sales and market-share data.

Already, client-research company partnerships are becoming popular. Thirteen percent of those executives responding to *Advertising Age's* 1991 survey of research companies say they are involved in some form of partnership agreement.

Marketers also are demanding research providers work far more closely with them. American Chicle, for example, has set up on-site office hours for analysts from its research suppliers, Mr. Abate says. These analysts come in at least once a week to interpret data and write reports as if they were part of American Chicle's own staff.

Providers of scanner data insist existing and planned software will make using data easier and wean client companies off their dependence on suppliers for interpretation.

Information Resources Inc. Chairman-CEO Gian Fulgoni contends "data overload" as a lament of research users peaked in 1987.

In fact, 38.2% of the market research companies surveyed say their clients are "very able" to use the volume of data available, and another 51.5% say they're "somewhat able." Only 10.3% say clients are "not very able" to use the data.

Mr. Abate, among others, has his doubts clients are so adept at data manipulation.

"The complexity of these analyses is getting greater and greater even as we're working with them," he says. "I think there are still going to be lots of things that we'll have to go to the suppliers for."

Mr. Figura agrees the age of do-it-yourself analysis for client companies is far off.

"Most people still haven't figured out how to grapple with all this stuff," he says.

"There's still a big gap between what's being sold . . . and what actually is delivered when you are trying to make decisions." □

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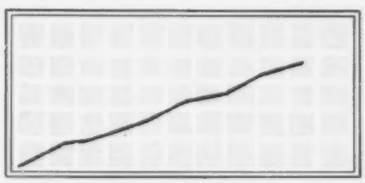

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Picking up the slack

As marketers cut, researchers are stepping in

By Julie Steenhuysen

Research companies' client-service departments are working longer these days —not always with extra pay for the effort.

A soft economy and downsizing in corporate research departments have led marketers increasingly to lean on their research partners for guidance and analysis.

AHF targets companies that have cut back in-house research.

Most research companies have seen clients' research departments undergo cuts: 84.1% of research companies surveyed by *Advertising Age* report their clients have trimmed in-house research staffs.

"When clients cut back in their own staff, they still have the need to do research. And what they do is rely more on companies like us to do their own work for them," says William "Jay" Wilson, president-ceo of research company Starch INRA Hooper.

Such downsizing has resulted in a change in clients' expectations, says Rod Cober, senior VP-marketing and client services at Burke Marketing Research.

Where once clients would design a research project, now they're focusing on setting the objectives for the project and leaving the design, implementation and analysis to the research company, Mr. Cober says.

Client-service departments in particular have felt the change. As many as 70% of the companies surveyed say they have increased their client-service functions as a direct result of cuts in clients' research departments.

The majority of survey respondents say they charge clients for these extra services, reasoning that good client services ought to be compensated.

Some companies, however—more than 20% of those surveyed —are absorbing the added service demands.

Arbitron Co., which serves the recession-battered media industry, has seen employees' workloads increase in tandem with client cuts.

"My staff has offered to bolster media clients' efforts when we can," says Henry Laura, VP-sales advertiser/agency services.

AHF Marketing Research is another company that doesn't charge for additional client-service demands. Instead, it's using client service to gain a marketing advantage.

AHF has been advertising its services as a way for downsized companies to make up for deficiencies in their own research departments. Calvin Greenbaum Creative Services, Sea Cliff, N.Y., created the campaign.

Nielsen Marketing Research USA President John Costello says the cutbacks have provided an opportunity for Nielsen.

"The tight economy has come at the same time as a real growth in information needs in some areas. . . . That's provided us a chance to step in and work with the existing [in-house] staff and provide a supplement to their research," Mr. Costello says.

Nielsen increasingly is sending employees on-site to work with clients on a day-to-day basis in such areas as promotion evaluation and analysis support and category management, Mr. Costello says. These employees remain on Nielsen's payroll, and fees for the services provided are charged to clients.

Although some research company executives see client cutbacks as a way to build new revenue sources, most generally say the long-term impact of client downsizing is negative.

"It brings into question among corporate management the need for research," Mr. Wilson says. "They say, 'If we can downsize, maybe we don't need it.' That has hurt the businesses' image among top corporations."

But Frank Walker, president of Walker Research, remains sanguine.

"In the long run, perhaps, putting the industry through the problems will make it healthier," he says. □

Scott Hume contributed to this story.

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Patrons of the arts

Sports-shy sponsors applaud theater, exhibits

By Scott Hume and Marcy Magiera

The producers toasted the Broadway opening of "City of Angels" with champagne, but when the show opens June 12 in Los Angeles, glasses likely will be filled with Johnnie Walker Black.

That's because Schieffelin & Somerset Co.'s scotch is the sole corporate sponsor of the musical's 43-city tour, following a marketing path blazed last year when "A Chorus Line" began its national tour with Visa International as its sole sponsor.

Stephen Disson, a principal with D&F Group, Washington, which arranged both deals, foresees greater corporate involvement in the performing and fine arts in the next decade. Some of that money will come from sports sponsorships, he said, and some will be new investments from companies looking to enter the sponsorship arena.

Companies spent $150 million on the arts in 1990, or 6% of the $2.5 billion spent on all corporate sponsorships, reported industry newsletter *Special Events Report*. Sports sponsorships accounted for 68%, or $1.7 billion.

This year, $2.9 billion will be spent on corporate sponsorships, the newsletter reported. Sports' take is projected to hit $1.9 billion, but its share may drop as more sponsorship dollars are funneled to cause marketing, festivals, popular music and the arts (projected to maintain about a 6% share with $176 million).

"The economics of sponsoring the national tour of a Broadway show are very appealing," Mr. Disson said. "You get to be the one and only sponsor; it's not diluted as it so often is with sports. And the cost for sponsoring a tour over many months is less than [for] one nationally televised sporting event on one weekend."

"Broadway doesn't know how to market itself, let alone work with corporate sponsors. But it's learning. . . ."

Adam Sanderson
Director of marketing, Affiliate Artists

Liquor and tobacco companies are looking for event marketing opportunities outside sports, where their presence has been criticized and advertising opportunities are limited.

Johnnie Walker Black's sponsorship of "City of Angels" will be mentioned in all TV and radio spots, media typically off-limits to the product. Serino Coyne, New York, handles the show.

The real growth in corporate involvement will come in performing and fine arts programs that tour several markets, Mr. Disson said. That lets sponsors arrange local-market programs for entertaining customers, distributors or staff.

Sara Lee Corp.'s L'eggs Products division last week signed a two-year deal to be the first—and only—corporate sponsor of the Ice Capades' national tour, to build awareness for its Sheer Energy pantyhose brand and Little L'eggs tights for children.

"We promised them there wouldn't be sponsorship clutter," said Thomas Abramson, VP-marketing and advertising for International Broadcasting Corp.'s Ice Capades/Harlem Globetrotters division. The Ice Capades also will customize its logo to include the Sheer Energy name and L'eggs egg. The Kempton Group, Cincinnati, negotiated the deal.

L'eggs has been involved in sports sponsorships since the 1970s and sponsored a series of concerts by the Judds, the country-western singing duo.

The fine and performing arts are latecomers to the sponsorship arena and will need more time to catch up to sporting events' slickness, execs say.

"Broadway doesn't know how to market itself, let alone work with corporate sponsors," said Adam Sanderson, director of marketing for Affiliate Artists, New York. "But it's learning, and the major corporations that have been involved with arts sponsorships have set a good example. Other companies will follow."

The fine arts have even more learning to do.

"The arts used to be protective about not commercializing themselves, but with the drop in [government] funding, the arts now need to turn to corporate sponsors," said Linda Morganstern, event marketing director at Leo Burnett Co., Chicago. "It's nice to get philanthropic grants, but [the arts] are going to have to open their minds to what sponsors may want from them. It's a new frontier for them."

The Smithsonian Institution has signed Xerox Corp. as sole sponsor of "Seeds of Change," an exhibit celebrating the quincentenary of Columbus' voyage that will visit eight cities during 18 months, beginning in October.

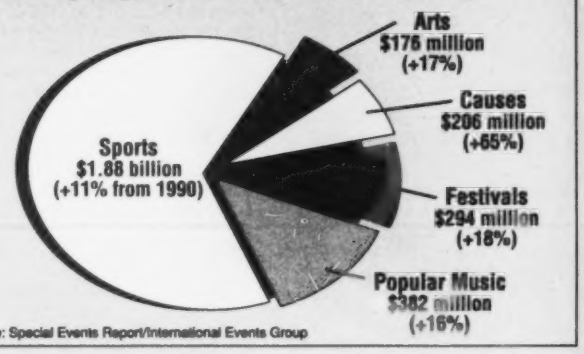
Xerox sees the sponsorship as "a reinforcement of the brand's equity," said Michael Kirby, director of advertising and sales. The company may try to take the exhibit overseas once its run at the Smithsonian is over.

But as with all marketing categories, arts sponsorships have their potential pitfalls. Hitachi America is in litigation over the collapse of a planned three-city International Opera Festival tour, in which it had a nearly $1 million sponsorship stake. But despite that experience, the company is looking at other cultural events.

"It's made us more careful about what kind of event we'd get involved with, but in no way have we given up on the arts or entertainment," said Harry McGrath, Hitachi deputy general manager. "With our budget, it's difficult to get into sports sponsorships without getting lost in the noise or settling for minor events. We're a worldwide company. We don't want to be involved unless we can in a major way." □

And now a few dollars from our sponsor

Sports' share of total sponsorship dollars is large but declining, accounting for 64% of the $2.94 billion expected to be spent in 1991, down from 72% in 1988. Sponsorship of the arts has remained steady at 6% during that period, but industry executives say that share may begin to grow. Here's a breakout of 1991 spending:



Source: Special Events Report/International Events Group

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Operation Welcome Home Parade, a June 10 parade down Broadway in New York, is being promoted by this official poster. A stylized picture of a skyscraper festooned by yellow ribbons instead of ticker tape, the poster was designed by artist Milton Glaser and printed by D&L Offset, pro bono, on the only 8-color press remaining in the city. The mile-long parade is expected to attract 2 million people.

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CONSUMER MAGAZINE AD LINAGE

	April 1991	April 1990	Year-to-date 1991	Year-to-date 1990
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	162.0	177.9	468.6	586.6
Automobile Magazine C.	88.8	79.1	257.6	235.6
Car & Driver C.	131.9	110.5	404.2	376.6
Car Collector & Car Classics	14.3	16.2	75.3	64.6
Car Craft	63.2	78.7	208.2	253.0
Circle Track	76.7	81.8	332.2	347.9
Cycle	45.0	65.8	156.8	155.9
Cycle World	45.7	63.8	161.2	179.8
Dirt Rider	45.9	40.2	151.3	147.6
Dune Buggies & Hot VWs	63.0	71.0	265.3	267.9
Easyriders	45.6	25.7	157.3	99.4
Family Motor Coaching	159.3	159.9	660.6	654.4
Four Wheeler C.	79.0	81.5	285.2	288.5
Hot Rod C.	67.4	79.5	226.5	257.4
Motorcyclist	63.8	53.8	169.7	148.8
Motor Trend C.	71.8	77.8	277.5	268.9
Motorhome	81.6	101.4	321.6	375.5
Petersen's 4 Wheel	77.5	85.4	247.6	283.7
Rider	52.5	46.3	93.2	122.3
Road & Track C.	99.0	105.0	340.6	329.2
Trailer Life	82.6	93.2	318.2	358.0
Total Group	**1,616.5**	**1,694.3**	**5,586.7**	**5,803.6**
% change	**-4.6%**		**-3.7%**	
■ Boating & yachting				
Boating	99.7	142.1	408.2	621.0
Chesapeake Bay	33.7	49.0	113.5	164.1
Cruising World	136.7	154.0	431.8	473.7
Lakeland Boating (11X)	71.5	90.5	273.0	350.0
Motor Boating & Sailing	117.4	130.4	393.3	514.7
Sail	112.6	109.4	415.0	500.5
Sailing World	70.5	67.5	211.9	220.3
Trailer Boats (11X)	54.8	77.7	231.7	317.5
Yachting C.	102.6	120.9	468.0	574.2
Total Group	**799.5**	**941.5**	**2,946.4**	**3,736.0**
% change	**-15.1%**		**-21.1%**	
■ Civic/fraternal				
Elk (10X)	14.2	16.0	63.3	66.2
Kiwanis	16.8	15.3	68.2	71.7
Lion (10X)	12.7	5.3	29.7	16.2
Rotarian	15.2	20.0	70.4	66.5
V.F.W. (11X)	28.6	27.6	111.7	107.3
Total Group	**87.5**	**84.2**	**343.3**	**327.9**
% change	**3.9%**		**4.7%**	
■ General				
American Health (10X) C.	26.8	60.8	88.5	211.4
American Heritage (8X) C.	68.8	36.7	124.5	113.3
American Legion	33.1	38.1	141.6	155.2
Art & Antiques (10X) C.	59.3	72.9	250.6	295.6
ARTnews (10X)	98.2	109.0	358.5	455.4
The Atlantic A. C.	45.8	69.8	195.5	207.0
Bon Appetit A. C.	82.3	99.6	307.3	350.6
Buena Salud (6X)	35.5	20.4	108.5	34.6
Cable Guide C.	27.0	29.0	105.5	117.9
Caribbean Travel & Life (6X)	—	—	125.6	76.2
Changing Times C.	47.1	54.4	192.8	217.8
Conde Nast Traveler C.	82.5	103.6	305.4	367.8
Connoisseur C.	99.8	74.3	201.9	238.1
Consumers Digest (6X) C.	—	—	47.9	48.1
Cooking Light C.	—	—	125.2	151.8
Country America (10X) C.	38.9	27.2	139.4	90.4
Departures N. America (6X)	57.1	48.7	136.9	87.1
Ebony C.	71.4	77.5	322.8	370.0
European Travel & Life (10X) C.	34.7	70.6	165.5	170.4
Food & Wine C.	41.3	65.3	174.9	213.6
Golden Years (6X)	—	—	64.4	84.0
Gourmet C.	102.0	122.2	346.2	396.8
Harper's Magazine A. C.	34.8	28.6	125.7	123.0
Islands (6X)	—	—	144.2	112.5
Let's Live	41.0	53.0	179.0	201.0
Life C.	37.5	30.8	156.3	178.1
Longevity C.	41.7	40.0	166.7	121.2
Mature Outlook (6X) C.	—	—	84.3	82.1
Modern Maturity (6X) C.	32.0	35.1	69.1	76.9
Money C.	97.5	114.2	377.6	401.0
National Geographic C.	37.7	27.0	98.3	97.7
National Geographic Traveler (5X) C.	—	—	98.3	98.9
Natural History C.	37.6	65.2	141.5	184.0
New Choices C.	26.1	48.8	104.0	126.2
Prevention C.	35.5	56.5	157.0	211.5
Reader's Digest A. C.	83.8	88.3	293.4	350.4
Saturday Evening Post (9X) C.	31.2	35.9	104.1	113.8
Smithsonian C.	83.8	101.8	291.6	332.1
Spin C.	57.4	35.5	162.2	168.5
Town & Country C.	87.9	133.3	292.5	492.5
Travel-Holiday C.	53.7	59.9	176.7	172.6
Travel & Leisure C.	118.3	164.4	442.4	500.0
Travelhost	1,091.4	1,990.0	4,361.5	4,983.0
Vanity Fair C.	140.6	150.7	376.3	446.1
Yankee C.	66.7	68.3	233.1	257.9
Total Group	**3,287.5**	**4,537.1**	**12,664.9**	**14,263.9**
% change	**-27.5%**		**-11.2%**	
■ Home				
Architectural Digest A. C.	113.1	185.7	394.7	580.1
Better Homes & Gardens C.	119.8	104.1	415.0	379.0
Colonial Homes (6X) C.	62.7	51.5	96.8	98.3
Columbus Monthly-Homes (4X)	16.8	30.5	39.1	57.2
Country Home (6X) C.	69.5	83.1	109.6	114.4
Country Life (6X)	—	—	109.8	104.8
Country Living C.	85.6	109.4	308.6	356.1
Decorating Remodeling (8X) C.	51.9	46.2	96.3	90.0
Family Handyman (10X) A. C.	52.1	32.2	176.2	127.6
Florida Home & Garden	28.3	64.5	156.3	275.0
Flower & Garden (6X)	—	—	39.9	46.7
Home C.	54.0	76.8	198.1	232.1
Home Mechanix C.	57.7	65.8	124.4	167.2
Homeowner (10X) C.	28.2	36.8	97.2	96.9
Horticulture	60.0	52.3	188.5	188.2
House Beautiful C.	65.9	75.2	225.0	236.4
House & Garden C.	97.2	112.9	290.4	346.9
Metropolis (10X)	39.6	54.1	149.4	164.9
Metropolitan Home C.	115.2	145.8	287.0	419.7
Midwest Living C.	93.3	87.5	143.9	128.5
1,001 Home Ideas C.	45.1	77.2	185.8	242.7
Organic Gardening (9X) C.	54.0	42.2	208.0	184.8
Phoenix Home/Garden	46.0	75.8	207.6	285.9
Practical Homeowner (9X) C.	49.2	42.4	193.7	157.8
San Diego Home/Garden	70.9	74.0	241.9	264.3
Southern Accents (11X) C.	48.4	100.8	136.7	235.3
Southern Living C.	136.5	129.9	406.9	435.4
Sunset Magazine A. C.	150.4	161.4	476.7	487.3
Workbench (6X)	—	—	44.7	27.9
Total Group	**1,813.1**	**2,118.1**	**5,748.0**	**6,531.5**
% change	**-14.4%**		**-12.0%**	
■ In-flight & other passenger				
Aboard Group (6X)	—	—	73.4	77.5
Alaska Airlines	50.1	67.5	205.8	281.2
America West Airlines	58.3	70.0	268.0	300.0
American Way (24X) C.	115.7	132.7	465.8	540.3
Continental Profiles	38.5	60.2	148.6	207.1
Delta Sky C.	64.8	76.1	257.8	285.8
Pan Am Clipper	30.3	56.8	127.0	185.9
Southwest Spirit	54.8	54.1	205.9	195.3
Spirit of Aloha	31.8	33.8	143.4	136.4
Trump's	29.5	16.0	83.1	60.5
TWA Ambassador	39.0	41.7	143.3	156.2
United Vis 'A Vis	61.8	76.8	271.0	272.2
US Air Magazine	62.9	61.3	259.3	233.4
Total Group	**637.5**	**747.0**	**2,652.4**	**2,931.8**
% change	**-14.7%**		**-9.5%**	
■ Men's				
Esquire A. C.	76.7	105.5	269.9	387.5
Firehouse Magazine	33.1	45.3	168.8	140.8
Gentlemen's Quarterly A. C.	141.9	173.6	497.8	621.8
M Inc. C.	44.2	65.7	196.7	267.7
Men's Health (6X)	—	—	47.1	24.3
Men's Fitness	31.2	31.2	129.9	123.1
Muscle & Fitness C.	125.7	117.6	479.3	417.0
Penthouse A. C.	52.9	52.3	230.8	206.4
Playboy A. C.	57.3	59.3	230.1	223.0
Total Group	**562.9**	**650.3**	**2,250.3**	**2,411.5**
% change	**-13.4%**		**-6.7%**	
■ Metropolitan				
Aloha (6X)	—	—	73.0	86.0
Annapolitan	45.5	63.3	175.5	257.0
Atlanta	66.4	83.8	250.6	266.6
Baltimore	62.9	81.9	181.6	243.7
Boston	78.5	110.4	295.4	396.9
California C.	56.2	81.2	185.6	247.1
Chicago	76.7	90.8	271.7	365.3
Chicago's North Shore	72.7	90.5	291.5	351.6
Cincinnati	40.6	54.0	134.2	153.3
Cleveland	65.2	53.0	155.9	167.4
Columbus Monthly	50.3	92.3	163.9	256.2
Connecticut	58.9	86.4	222.1	350.2
D/Magazine	52.4	62.6	184.0	216.5
Detroit Monthly	51.0	75.0	174.0	223.0
Grand Rapids	22.3	35.3	89.9	109.1
Gulf Coast (13X)	80.7	49.7	389.4	223.6
Honolulu	47.1	50.4	174.2	204.3
Houston Metropolitan Magazine	107.3	111.8	278.8	255.7
Inside Chicago (8X)	—	—	33.5	42.0
L.A. Style	95.0	133.0	283.1	396.6
Los Angeles	86.1	123.1	334.9	488.0
Louisiana Life (6X)	—	—	55.5	57.2
Madison	32.0	42.0	122.0	149.0
Memphis	57.3	49.7	191.3	208.3
Mid-Atlantic Country	74.2	70.0	201.2	169.5
Milwaukee	53.2	82.5	207.0	234.0
Minneapolis/St. Paul	77.9	117.9	197.8	426.6
Minnesota Monthly Mag.	67.4	75.1	196.6	250.1
New Jersey Monthly	41.1	82.9	170.8	268.0
New Mexico	38.8	39.4	161.3	149.8
New York Woman (10X)	31.3	49.3	95.1	131.9
Ohio	36.8	35.8	155.8	185.1
Orlando	103.9	108.0	372.9	394.2
Pacific Northwest	36.2	71.0	116.3	195.9
Palm Beach Life	31.8	68.1	223.1	351.6
Palm Springs Life	95.8	107.2	552.8	608.0
Philadelphia	118.8	145.7	409.3	539.3
Phoenix	29.1	35.2	114.6	160.0
Pittsburgh	63.2	67.3	246.5	248.1
Rhode Island Monthly	31.2	59.4	151.8	203.2
Sacramento Magazine	49.0	72.0	202.7	225.1
St. Louis	35.3	69.5	139.3	193.2
San Diego	95.5	134.2	359.4	498.6
San Francisco Focus C.	73.9	111.0	259.0	359.8
Sarasota (10X)	55.5	75.0	299.5	405.0
South Florida Magazine	54.6	107.9	230.8	387.1
Texas Monthly C.	117.4	114.6	415.2	429.1
The Washingtonian	96.4	149.2	375.8	514.6
Total Group	**2,811.4**	**3,668.3**	**10,691.3**	**13,233.0**
% change	**-23.4%**		**-19.2%**	
■ Music/entertainment				
Audio	72.1	73.3	297.6	325.8
Dance Magazine	57.8	58.3	254.2	256.6
Playbill	42.3	44.3	150.5	169.9
Premiere C.	75.2	92.6	230.2	257.6
Video Magazine	63.2	59.2	266.1	257.2
Total Group	**310.5**	**327.8**	**1,198.6**	**1,267.2**
% change	**-5.2%**		**-5.4%**	
■ Outdoor & sport				
Alaska	46.5	51.8	187.6	174.1
The American Handgunner (6X)	—	—	103.0	113.0
American Hunter	12.2	14.2	59.7	71.2
American Rifleman	20.1	17.8	78.9	85.3
Backpacker (8X) C.	53.8	41.8	76.0	65.4
Bassmaster (10X) A. C.	52.5	75.2	314.8	319.6
Bicycling (9X) C.	138.2	135.0	341.0	349.1
Body Boarding (8X)	29.2	39.4	55.7	70.8
Ducks Unlimited (6X)	—	—	54.9	71.6
Field & Stream C.	71.1	67.3	265.5	292.2
Fishing World (6X)	—	—	71.2	128.0
Flex	82.5	70.3	293.7	255.2
Florida Sportsman	121.4	138.3	487.0	597.5
Golf Digest C.	118.5	120.5	401.2	476.8
Golf Illustrated C.	46.3	63.1	159.1	179.9
Golf Magazine C.	87.3	95.6	464.9	490.8
Guns	34.0	35.0	142.0	144.0
Guns & Ammo	38.8	39.4	139.4	185.3
In-Fisherman (7X)	68.0	82.0	255.0	275.5
Outdoor Life C.	77.9	75.7	262.2	269.6
Outside Magazine C.	102.4	80.6	270.2	233.9
Petersen's Hunting	37.2	38.2	141.0	136.7
Runner's World (12X) C.	54.9	43.8	198.8	124.7
Salt Water Sportsman C.	78.1	90.6	380.8	473.9
Shooting Times	23.8	28.3	102.4	124.1
Sierra (6X)	—	—	86.5	69.5
Ski (8X) A. C.	38.3	45.0	287.0	252.8
Skiing (7X) A. C.	—	—	229.6	230.0
Skin Diver C.	131.3	120.1	475.3	445.4
Southern Outdoors (9X)	45.2	41.0	172.9	193.0
Southern/Western Links (6X)	44.9	40.2	72.8	72.7
Sport Magazine C.	28.9	27.6	133.3	114.0
Sports Afield C.	76.6	76.9	269.3	282.3
Surfing	69.7	59.7	276.7	235.2
Tennis C.	74.5	64.6	226.9	230.2
Volleyball (9X)	25.1	—	53.7	—
Waterski (10X)	60.8	83.6	230.7	244.0
Western Outdoors (9X)	24.0	43.4	98.3	166.6
WindRider (8X)	52.8	66.5	105.5	127.2
World Tennis C.	41.8	48.8	123.6	141.3
Total Group	**2,118.5**	**2,161.3**	**8,148.2**	**8,552.1**
% change	**-2.0%**		**-4.7%**	
■ Photography				
American Photo (6X) C.	—	—	86.1	86.7
Petersen's Photographic	37.8	27.7	114.7	88.8
Popular Photography C.	106.9	104.2	422.7	396.9
Total Group	**144.7**	**131.9**	**623.5**	**572.4**
% change	**9.7%**		**8.9%**	
■ Science/electronic/mech				
Discover C.	40.4	32.4	134.1	146.3
Home Office Computing C.	36.3	39.0	157.6	206.9
Omni C.	52.2	45.3	229.5	210.1
Popular Mechanics C.	80.0	75.8	237.3	256.5
Popular Science C.	65.4	76.6	213.5	236.0
Scientific American C.	79.0	35.6	218.0	138.3
Spectrum C.	46.0	47.6	185.1	207.0
Total Group	**399.2**	**352.4**	**1,375.1**	**1,401.1**
% change	**13.3%**		**-1.9%**	
■ Woman/fashion/service				
Bride's Magazine (6X) A. C.	443.7	504.3	1,251.5	1,295.0
Cosmopolitan A. C.	180.4	192.1	622.7	635.0
Elle C.	158.7	238.1	553.6	682.1
Essence C.	64.8	73.5	229.4	272.7
Family Circle (17X) A. C.	167.7	184.9	515.2	537.8
Glamour C.	206.6	194.4	567.9	553.2
Good Housekeeping A. C.	146.3	156.2	526.9	524.5
Harper's Bazaar C.	98.2	127.6	376.9	477.8
Health C.	36.8	39.7	134.5	143.9
Imagen	89.9	133.0	293.7	384.1
Ladies' Home Journal C.	138.8	148.7	497.5	498.1
Lear's C.	48.4	53.5	166.5	220.5
Mademoiselle C.	138.4	166.9	398.4	479.8
McCall's C.	80.2	72.5	333.9	305.6
Military Lifestyle (10X)	35.9	45.6	135.8	169.2
Mirabella C.	94.4	84.2	323.1	369.7
Modern Bride (6X) C.	380.6	393.8	1,007.9	1,025.2
New Woman C.	68.4	91.8	258.1	301.4
Parenting (10X) C.	77.5	78.7	240.1	211.4
Parents Magazine A. C.	121.9	138.0	445.3	441.7
Redbook C.	101.0	92.6	361.3	359.0
Self C.	98.7	117.9	298.4	410.1
Seventeen C.	105.3	153.9	340.7	449.5
Shape C.	62.7	54.1	213.8	199.1
Soap Opera Digest (26X) C.	49.5	39.5	143.5	135.7
Teen Magazine	44.5	44.3	162.0	173.1
True Story A. C.	43.1	56.2	162.0	221.6
Victoria C.	51.1	53.9	173.5	192.2
Vogue C.	231.5	289.3	885.1	1,000.0
W Magazine (26X) C.	102.9	136.1	409.1	529.7
Weight Watchers C.	29.0	37.3	137.1	150.6
Woman's Day (15X) A. C.	104.6	119.4	307.6	450.7
Workbasket (6X)	—	—	37.1	21.3
Working Mother C.	60.3	66.6	224.3	243.1
Working Woman C.	68.9	79.4	282.9	330.1
Total Group	**3,930.6**	**4,457.8**	**13,017.0**	**14,394.3**
% change	**-11.8%**		**-9.6%**	
■ Youth				
Boys' Life C.	18.7	15.2	64.0	73.8
Campus Life (10X)	41.0	37.8	206.7	177.8
Total Group	**59.7**	**53.0**	**270.7**	**251.6**
% change	**12.6%**		**7.6%**	
■ Business/national				
Barron's	162.5	177.1	514.9	575.0
Black Enterprise C.	40.3	50.5	248.0	280.9
Business Week (52X) A. C.	350.3	426.3	951.1	1,182.3
Economist (52X) C.	194.4	254.1	735.3	857.7
Entrepreneur C.	168.0	166.4	703.6	677.1
Financial World (26X) C.	92.0	111.0	216.7	356.0
Forbes (26X) C.	354.5	479.0	920.1	1,158.9
Fortune (26X) C.	297.2	327.9	705.9	952.8
Frequent Flyer	34.8	39.7	144.1	152.7
Futures	50.2	43.3	160.4	160.2
Harvard Bus. Review (6X) C.	—	—	102.7	120.3
Inc. Magazine C.	75.4	72.2	272.7	309.0
Income Opportunities	65.4	71.1	304.2	298.0
Industry Week (23X) A.	78.2	99.8	270.4	353.6
Nation's Business (12X) A. C.	23.8	20.1	103.0	103.0
Success C.	31.1	32.2	142.9	111.7
Total Group	**2,018.1**	**2,370.5**	**6,495.9**	**7,649.0**
% change	**-14.9%**		**-15.1%**	
■ Business/regional				
Bus. First-Columbus (52X)	116.3	102.4	392.6	345.6
Bus. Jrnl.-Milwaukee (52X)	136.7	169.0	465.0	603.0
Bus. Jrnl.-Sacramento (52X)	97.6	107.6	304.2	351.8
Bus. North Carolina	34.7	44.2	117.3	144.8
Capital Dist. Bus. Review (52X)	111.0	104.9	296.2	282.5
Caribbean Business	86.9	120.1	339.5	387.0
Corporate Rpt. Minnesota	37.2	41.7	170.3	132.6
Crain's Chicago Bus. (52X)	150.7	185.0	389.4	536.1
Crain's Cleveland Bus. (52X)	101.0	130.6	245.9	292.0
Crain's Detroit Bus. (52X)	74.8	105.8	258.3	349.8
Crain's New York Bus. (52X)	90.0	94.0	227.0	247.0
Florida Trend (13X)	55.5	95.5	143.3	204.8
Georgia Trend	48.7	51.2	148.0	169.3
Grand Rapids Bus. Jrnl.	64.5	57.7	208.4	214.3
Hawaii Business	52.2	54.0	191.9	195.0
Houston Bus. Jrnl. (52X)	161.9	94.0	444.0	293.0
Indianapolis Bus. Jrnl. (52X)	160.8	164.9	469.0	549.6
Nashville Business & Lifestyle B.	21.1	—	80.8	—
New England Bus. (12X) A.	30.2	40.0	95.5	135.8
New Orleans City Bus.	69.1	43.4	297.8	197.2
Pacific Bus. News (52X)	118.4	146.1	394.0	406.3
Philadelphia Bus. Jrnl. (52X)	129.0	161.8	207.2	269.2
Pittsburgh Bus. Times (52X)	65.9	102.9	230.4	390.0
Providence Business News	70.5	69.5	261.5	264.8
Regardie's/Washington (7X)	92.0	134.0	267.0	466.0
St. Louis Bus. Jrnl. (52X)	166.7	134.4	495.9	436.7
Warfield's/Maryland (26X)	63.7	69.8	207.6	230.9
Total Group	**2,385.9**	**2,624.4**	**7,267.1**	**8,095.0**
% change	**-9.1%**		**-10.2%**	
■ National Sunday mags				
Parade (52X) C.	55.8	71.3	252.4	213.3
USA Weekend (52X) C.	62.7	65.4	213.0	220.0
Vista Magazine (52X)	12.6	17.3	52.3	63.6
Total Group	**131.2**	**154.1**	**517.6**	**497.0**
% change	**-14.9%**		**4.2%**	
■ Newspaper Sunday magazine				
Boston Globe	114.5	155.6	491.2	707.9
Chicago Tribune	156.5	153.4	375.9	470.0
Cleveland Plain Dealer	69.3	94.5	160.7	230.5
The Dallas Morning News	59.7	71.2	180.2	202.8
Detroit Free Press	66.0	92.0	156.0	196.0
L.A. Times C.	136.8	140.4	242.3	351.5
New York Times Mag. C.	287.6	443.6	967.3	1,262.2
Philadelphia Inquirer	111.5	133.1	289.9	357.4
Seattle Times	60.0	109.0	228.0	300.0
St. Louis Post Dispatch	102.8	102.2	299.3	296.0
Toledo Blade Magazine	33.6	51.2	128.4	138.0
Washington Post	88.7	130.3	323.9	406.5
Total Group	**1,287.0**	**1,676.5**	**3,843.1**	**4,915.8**
% change	**-23.2%**		**-21.9%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	204.3	122.0	718.8	517.3
Army Times Military Group:				
Air Force Times (52X)	163.4	185.6	531.3	604.4
Army Times (52X)	155.5	178.9	519.9	593.0
Navy Times (52X)	166.7	196.7	561.8	628.6
Capper's (26X)	27.9	27.8	123.4	127.8
Commonweal (22X)	7.5	13.5	33.6	45.6
Entertainment Weekly (52X) C.	56.2	59.6	241.8	211.9
Golf World (41X) C.	188.1	156.7	616.2	621.5
Grit (52X) A.	31.0	51.0	151.0	160.0
Jet (52X) C.	98.5	107.4	334.5	338.8
National Journal (50X) C.	83.8	94.3	203.8	222.8
National Review (25X)	11.6	35.9	42.6	102.9
New Republic (48X)	47.0	42.1	162.8	161.1
New York Mag. (50X) C.	232.3	310.5	666.6	831.6
New Yorker C.	182.8	252.6	500.7	742.0
Newsweek (52X) A. C.	160.7	216.2	529.7	689.7
People (51X) C.	283.0	405.2	946.1	1,061.6
Rolling Stone (25X) C.	144.6	165.8	443.7	552.4
Sporting News (52X) C.	45.9	60.7	135.0	178.3
Sports Illustrated (52X) A. C.	218.8	236.5	676.3	815.2
Time (52X) A. C.	214.7	272.2	656.3	801.4
TV Guide (52X) A. C.	178.6	231.0	832.1	1,033.6
US Magazine (26X) C.	44.1	80.6	131.4	225.3
U.S. News & World Report (50X) A. C.	188.0	185.4	515.2	581.7
Total Group	**3,134.9**	**3,688.3**	**10,274.5**	**11,848.6**
% change	**-15.0%**		**-13.3%**	

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.

NOTE

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LAST MINUTE NEWS

Snyder seen as next AAF president

NASHVILLE, Tenn.—Wally Snyder, exec VP of the American Advertising Federation, is the likely choice of the AAF's board to succeed Howard Bell as president of the 52,000-member trade group, industry sources said. The board was scheduled to vote today at the AAF national conference here *(see story on Page 4)* on who will take over at yearend when Mr. Bell retires. Mr. Snyder came to the AAF in 1985 from the Federal Trade Commission, where he was associate director of advertising practices.

Goldstein Chilko suit settled

CINCINNATI—A wrongful-death suit filed against Omnicom Group and its DDB Needham Worldwide unit by the widow of Robert V. Goldstein, former Procter & Gamble VP-advertising, has been settled out of court. The case had been slated for trial June 17. Mr. Goldstein and four others were killed during an August 1987 rafting trip on Canada's Chilko River organized by executives in DDB Needham's Chicago office. Terms of the settlement weren't disclosed. Nancy Goldstein had sought $20 million in damages.

Dentsu board gets more int'l

TOKYO—Dentsu has named four new executive directors to its board, increasing the board's international focus. New board member Nobuo Momose, 57, director of account service division 7, has built a reputation as a talented client-service director especially with foreign clients such as Nestle and Philip Morris. Other new executive directors on the board are Gunshiro Nemoto, 54, director of account

(Continued on Page 8)

INSIDE

One on one: Michael Jacobson takes on product marketers. **Page 12**

WORK PLACE.

Really smokin': Wrigley hikes budget, adds spots to hot campaign. **Page 14**

AmEx shops around

New marketing answers sought beyond O&M

By Jon Lafayette and Gary Levin

NEW YORK—American Express Co. is seeking new marketing solutions for its troubled credit card division and is looking beyond its primary ad agency, Ogilvy & Mather, for help.

Although AmEx is seeking new work from O&M, the company has also turned to Wunderman Worldwide and Chiat/Day/Mojo, two agencies already on its roster, for new ideas.

AmEx is taking a broad look at the brand image of all its credit cards but is also looking to replace O&M's "Membership has it privileges" umbrella marketing theme, sources said.

"They outlined an opportunity to current agencies and asked for their thinking," said an executive close to the company.

Wunderman, a unit of Young & Rubicam, handles direct marketing and media advertising for AmEx's corporate card and Optima card while Chiat handles both for the Gold card.

O&M has handled advertising and direct marketing for the $60 million green card account since 1962, and the agency has come under pressure since several key staffers who worked on the account left the agency.

Last month in London, Wunderman was named to handle a new campaign to stimulate card use, beating out several agencies, including O&M, which retained the green card account.

AmEx denied a shift in strategy or agency lineup is imminent.

"We always talk to [our agencies] about strategy, and

(Continued on Page 54)

KGF eyes ConAgra counter

By Julie Liesse

The Eating Right brand looks like it's going to be Kraft General Foods' healthy choice.

Determined to find a brand name to showcase a multicategory line of "healthy" foods, the nation's leading food marketer is readying a product line under the Eating Right banner that would encompass dry grocery, dairy and frozen foods.

Such a line would be the first direct competition for ConAgra's Healthy Choice, which is rapidly expanding its own supermarket presence beyond the freezer case.

An Eating Right line would replace Kraft Alternatives, a similar group of low-cholesterol, low-fat "foods for healthier eating" that Kraft General Foods has been testing in two markets since February.

Tennis star Chris Evert stars in new spots for the Eating Right line from Kraft General Foods.

Subsidiary All American Gourmet Co. rolled out Eating Right frozen entrees this spring after a short test.

Kraft General Foods confirmed it's considering putting the Eating Right name on the six-category Alternatives line, which includes salad dressing, mayonnaise, chunk cheese, processed cheese slices, table spread and cream cheese. But the company declined to comment on specific marketing plans for the line.

■ **Food marketers beating hasty retreat from health claims—Page 3.**

However, Chris Evert, spokeswoman for the new Eating Right frozen entrees, has already filmed two TV commercials for an Eating Right frozen dessert and Eating Right frozen pizza, said the tennis star's representatives at IMG.

Also, supermarket buyers around the country have been advised by Kraft General Foods representatives that the company is going to present to

(Continued on Page 55)

Karen Cawthon

By Rob Levin

In the South, it's become almost commonplace to dub any promising new ad agency "the next McDonald & Little"—a tribute to a shop that put Atlanta advertising on the map in the 1970s.

McDonald & Little went out of business in 1985, four years after being acquired by Ted Bates Worldwide. One day in 1989, Michael G. McDonald, co-founder of the original agency, retired and restless, had an idea:

"I thought, 'Gee, I know something about being the next McDonald & Little,' " he recalls.

His new agency, McDonald Group, started with a flourish, hurtling from letterhead to $10 million in billings even before officially opening its doors in January 1990.

Things haven't gone quite so well since. *Advertising Age*, with Mr. McDonald's cooperation, has monitored his return to the advertising business and reports on a celebrated adman's effort to recapture the magic.

Summer 1991: Retired since 1986 and just 57 years old, Mr. McDonald is bored. Nothing in his life has matched the fun and challenge of building McDonald & Little, which at its peak billed more than $60 million and was the largest independent agency in the South.

McDonald & Little, he remembers with pride, turned out some of the South's most memorable advertising. It had big-name cli-

(Continued on Page 18)

The Triple Crown

Last month, U.S.News won three of the most prestigious awards in journalism.

1. Overseas Press Club Award

The Overseas Press Club Award for the Best General Magazine Article on Foreign Affairs for "The Most Dangerous Man in the World," a grave warning about the menace of Saddam Hussein – published ten weeks before Saddam invaded Kuwait. It meticulously outlined the size and scope of the arsenal being accumulated in Iraq.

Commenting on this cover story, the Washington Post said, "U.S.News can lay claim to some remarkable prescience.... Such editorial decisions are not flukes, but evidence of thinking ahead of the curve."

2. National Magazine Award

The National Magazine Award for Feature Writing for "Vietnam Story," a powerful reconstruction of the first major battle of that war and a tough analysis of its lessons and consequences -- written by Joseph Galloway, the only journalist present at that engagement 25 years ago.

Galloway also covered the war in the Persian Gulf for U.S.News, where his reporting was part of the extensive war coverage that Forbes magazine called "a journalistic coup.... Just as CNN left the networks running to catch up in TV coverage, U.S.News pulled off a similar feat over its newsweekly rivals."

3. Sigma Delta Chi Award

The Sigma Delta Chi Award for Magazine Reporting for "Death at Sea," an expose by Peter Cary of the Navy's investigation into the explosion aboard the *U.S.S. Iowa.* Within two months, the Navy reopened the case.

It's one example why government and business leaders in Washington, in a recent survey by Washingtonian magazine, rated U.S. News more accurate than any other newsmagazine. And why Forbes calls U.S.News "the most useful, readable newsweekly."

These three awards, plus the White House Correspondents' Association's Award for Presidential Coverage and sixteen other major awards received for 1990, confirm our commitment to deliver the best newsmagazine journalism in America.

U.S.News

NEWS SUMMARY

■ **American Express Co.,** seeking new marketing solutions for its troubled credit card division, is looking beyond its primary agency, Ogilvy & Mather. 1

■ **Kraft General Foods** is readying a broad grocery products line under the Eating Right banner. 1

■ **U.S. Army** put its recruiting ad account, now at Young & Rubicam, up for review. 3

■ **Food marketers,** including Kraft General Foods, responding to FDA complaints, said they would eliminate percentage fat claims from food packages and labels. 3

■ **Elizabeth Taylor** will use TV and print this summer to introduce her new women's fragrance, White Diamonds. 3

■ **Top Addy award winners** at the AAF national conference were GSD&M and Elgin Syferd/DDB Needham. 4

■ **Kellogg Co.** in August will introduce Double Dip Crunch, its second new children's cereal of the year. 4

■ **Nabisco Foods** awarded a bonus to agency Lowe & Partners for its campaign for Grey Poupon mustard. 6

■ **Unilever** is testing an incentive system for its U.K. agencies and may expand it to Europe. 6

■ **Vons** California grocery chain dropped J. Walter Thompson USA from its $22 million account. 6

■ **Anne Klein Group** this week will unveil a new line of clothing called A Line. 8

■ **Product placements in movies** were attacked by ad critic Michael Jacobson, but the Federal Trade Commission's reaction was cool. 12

■ **Wm. Wrigley Jr. Co.** has shifted all Spearmint gum media dollars into its smoker's alternative campaign. 14

■ **Compact disc players** that show videos, play games and provide reference material will arrive this fall. 16

■ **Murata** next August will introduce a facsimile machine designed for home use. 16

■ **Most magazines** that have bucked the general advertising downturn serve specific niches. 20

■ **An Ohio legislator** has proposed selling ad space on state property, including tax return forms. 50

■ **Toyota** is introducing its new Paseo sporty subcompact with TV spots spoofing subliminal advertising. 53

■ **Apple Computer** says it will put more emphasis on product and less on image in its ads next year. 53

■ **Della Femina, McNamee** Chairman Jerry Della Femina will become ceo of parent Eurocom's new U.S. holding company, Eurocom Della Femina. 55

■ **Upfront buyers** have bought about half the prime-time network TV upfront supply for next season. 57

■ **Ford's** award of its Eastern Europe account to Ogilvy & Mather may mean more multicountry accounts there. 58

DEPARTMENTS

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Weak season ahead

Agencies expect lackluster results for new shows

By Joe Mandese

Only five of the 25 new series scheduled by the Big 3 networks for the 1991-92 TV season are predicted to have winning audience shares, according to an informal survey of agency executives by *Advertising Age*.

Only one of the new series, ABC's "Home Improvement," is expected to be a "hit" by those polled.

Twelve of the new series are projected to have dubious fates, each generating estimated audience levels of 15 share points or less.

A share point is equal to 1% of TV households watching TV during a given time period. A show is usually deemed successful if it captures at least a 20 share.

Agency executives deemed the balance of the new series to be "borderline."

In addition to "Home Improvement," shows expected to win their time periods with more than a 20 share include ABC's "Step by Step", CBS' "The Carol Burnett Show" and NBC's "The Torkelsons" and "Nurses."

The estimates are based on the strength of a new series' pilot episodes and are generally more conservative than a network's own estimates.

Agency executives base their estimates on the audience flow of shows leading into and out of the new shows and weigh the appeal of the new programs against the strengths of competing shows scheduled on the other networks.

Overall, agencies predicted the Big 3 will lose about 2 share points during the fourth quarter of 1991, compared with the same period last year. The losses will come at the expense of NBC, while ABC and CBS are expected to remain flat in their overall audience delivery.

Based on the new estimates, agency executives said a new ranking of the top 20 shows will emerge with the new season, both in terms of household and demographic delivery.

According to estimates from New York-based Bozell, ABC's "Family Matters," CBS' "Sunday Night Movie," and NBC's "The Goiden Girls" and "Unsolved Mysteries" will drop out of the top 20, along with NBC's canceled "Matlock."

At the same time, ABC's "The Wonder Years" and "Home Improvement," and NBC's "In the Heat of the Night," "Wings" and "L.A. Law" will enter the top 20, Bozell said.

While "Home Improvement" is the only new series to join the top 20 ranking on a household basis, several new series will emerge as demographic leaders, Bozell said.

"Home Improvement" will deliver top 20 shares in all the major demos, while ABC's "Step by Step" will rank highly with women ages 18 to 34, teens 12 to 17 and kids 2 to 11. CBS' "The Carol Burnett Show" is predicted to be a leader in delivering men and women 50-plus, as is NBC's "I'll Fly Away."

NBC's "The Torkelsons" and "Nurses" are projected to deliver high shares of women 50-plus.

Fox Broadcasting Co.'s series aren't expected to deliver winning household shares, but the fledgling network's "Roc" series is expected to rank in the top 20 with men 18 to 34 and "Shut Up, Kids" with kids 2 to 11.

Although Fox's new series may not generate high household shares by Big 3 standards, agency executives noted that "Roc" and "Shut Up, Kids" with projected 14 and 13 shares, respectively, should still be considered successes, because Fox's ratings average about half of the Big 3's.

Moreover, agency executives noted that even "borderline" and "failing" series on the Big 3's schedules must be weighed against the objectives of specific time periods.

"Any of the other networks would be happy to have a 15 share opposite CBS' "60 Minutes" on Sunday nights," said Bozell Director of Broadcast Research Steve Sternberg. "But that might be considered a failure on any other night."

He added that the relatively low share estimates for new shows initially touted by agencies, including CBS' "The Royal Family" and ABC's "The Commish," reflect the difficulty of their time slots.

"It's a tough time period for CBS," Mr. Sternberg said. "You have 'Dinosaurs' and 'Wonder Years' getting the kids and teens on ABC and "Unsolved Mysteries" getting the older viewers on NBC."

The definition of a successful share for the 1991-92 season is complicated by the current parity in the three-network race, said Dave Marans, senior VP-research at J. Walter Thompson USA.

"It's difficult to say what's a winning share, because a show like 'thirtysomething' was doing an 18 share with excellent audience composition, but the network programmers felt it didn't merit returning," he said. □

How they'll do

Agency share estimates for new 1991-92 network TV series*.

Series (network)	Share of audience
Home Improvement (ABC)	25
Step by Step (ABC)	23
Nurses (NBC)	23
Carol Burnett (CBS)	21
The Torkelsons (NBC)	21
I'll Fly Away (NBC)	18
Home Front (ABC)	17
Royal Family (CBS)	17
Princesses (CBS)	17
The Commish (ABC)	16
Grown-ups (ABC)	16
Brooklyn Bridge (CBS)	16
Palace Guard (CBS)	16
Bird & Katt (ABC)	15
Teech (CBS)	15
Reasonable Doubts (NBC)	15
Good & Evil (ABC)	14
CBS Saturday Movie (CBS)	14
P.S. I Luv U (CBS)	14
Adventures of Mark & Brian (NBC)	14
Man of the People (NBC)	14
Pacific Station (NBC)	14
Flesh 'N' Blood (NBC)	14
FBI: The Untold Stories (ABC)	13
Eerie, Indiana (NBC)	12

*Average of six major agency reports.

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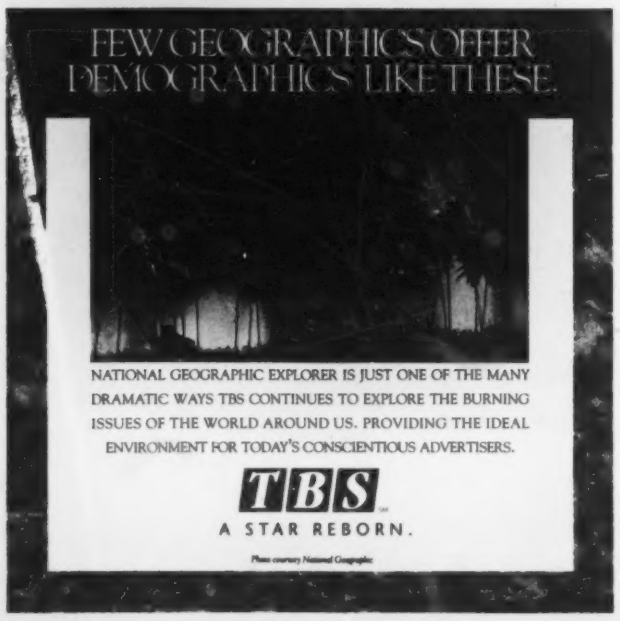
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Claiborne attire tries on ads . . .

By Pat Sloan and Gary Levin

NEW YORK—Liz Claiborne Inc., the country's largest women's apparel marketer, is looking to Madison Avenue after building to more than $1.7 billion in annual sales during the past 16 years with little or no advertising.

The company has given a preliminary nod to a $15 million print campaign scheduled to break this fall, industry sources said.

Official approval for the plan is expected this week.

The effort is slated to break in late fall and will consist of multiple-page spreads in a variety of magazines, from Altschiller Reitzfeld/Tracy-Locke.

Wendy Banks, senior VP-corporate marketing for Claiborne, said she couldn't confirm the company's marketing plans, but sources close to the company said bids are now being taken from photographers. Once final approval is given, shooting will start within the next several weeks.

"I have heard there was a marketing program coming," said retail analyst Walter Loeb of Loeb Associates. "They're one of the biggest, so it doesn't surprise me."

A $15 million ad budget would make Claiborne possibly the leading ad spender in apparel.

Leslie Fay Cos., the second-largest women's wear marketer with sales estimated at $850 million, spent only $2.9 million on measured media in 1990, according to LNA/Arbitron Multi-Media Service.

Ellen Tracy, another major women's wear company, spent $1.3 million, while Calvin Klein Inc. spent $7.3 million (men's and women's apparel) and Guess Inc., $12.3 million (men's, women's and children's apparel).

"Claiborne is one of the few and maybe [the] only major apparel manufacturer that's not done image advertising," said one executive close to the company. Instead, the company has relied on co-op newspaper ads with retailers and mini-catalogs.

In today's tough retail climate, "retailers and their suppliers have to market themselves better," Mr. Loeb said. "Claiborne has such a dominant position that they have to help the retailer. They can't stand still. They have to move forward."

Sources speculate the goal of the campaign is to bring new buyers into the market and to put Claiborne in control of its image, recently extended to men's clothing and women's jewelry.

Claiborne currently advertises its fragrances via Altschiller. □

. . . As Neutrogena boosts use of TV

By Pat Sloan

Neutrogena Corp., a longtime print advertiser, is increasing its use of TV to counter intensified competition and flat sales.

The toiletries marketer has been working with Dailey & Associates, Los Angeles, on a project basis since last year to incorporate TV into its media mix. Neutrogena plans to allocate a greater portion of its $38 million budget to the medium.

"We never have spent more than $1 million on TV, and that was back in the '70s," CEO Lloyd Cotsen said, adding, "It wasn't done well, and it didn't work."

The company took a second crack at TV last year, starting a $3 million-plus test campaign for Neutrogena shampoo in Los Angeles and Boston. That effort, also from Dailey, will roll out nationally this month, after having been extended to markets representing 59% of the country during the past five months.

The ad budget is expected to increase with the rollout of that effort. Neutrogena's agency of record is Eisaman, Johns & Laws.

The spots focus on product benefits and are themed "Neutrogena shampoo. A breath of fresh air for your hair." That campaign spurred at least a 20% increase in shampoo sales, said Martha Pease, senior VP-marketing.

In August, Neutrogena will start a second national TV campaign, for its core skincare business.

Ms. Pease said the $6 million skincare campaign will run through October, supported by a free standing insert in Sunday newspapers.

"What we want to do is bring the Neutrogena message to a broader audience," Ms. Pease said.

Both Ms. Pease and Mr. Cotsen cited the aggressive use of TV by Neutrogena rivals—notably L'Oreal's Plenitude and Procter & Gamble Co.'s Oil of Olay—as one reason for the media shift.

Last year, L'Oreal spent more than $16 million in measured media on network TV for Plenitude and P&G more than $25 million for Oil of Olay.

"The other thing that's forcing us to look at our business differently is the way industry sales are shifting in terms of outlets," Mr. Cotsen said. Because of retail consolidation, "there are today fewer drug outlets doing more of the business," he said.

As a result, the company is broadening its distribution, both by adding newer retail formats, such as combination food-and-drug outlets, to its U.S. accounts and by increasing its presence in Europe. □

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